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# Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Alerts

Version 3.1, 3/31/2013  
CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on <http://www.cms.gov/Medicare/Medicare.html>.

**Slide notes**

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Alerts course.

As a reminder, you may view the slide number you are on by clicking on the moving cursor.

Additionally, you can view the narration by clicking the Closed Caption [CC] button in the lower right hand corner of the screen.

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## Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:

<http://www.cms.gov/WorkersCompAgencyServices/>.

### Slide notes

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## Course Overview

- Alerts Explained
- Accessing Alerts
- Responding to Alerts

**Slide notes**

This course describes what an alert is, explains the different ways to access an alert and clarifies what to do when an alert is received.

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## WCMSAP E-mail Notifications

WCRC reviews submitted case for completeness and accuracy

If errors are found WCRC sends e-mail alert to e-mail address provided during account setup

**Slide notes**

Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted are reviewed by the Workers' Compensation Recovery Contractor (WCRC) for completeness and accuracy.

If errors are found, the WCRC will send an alert e-mail to the e-mail address provided during account setup.

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Send	From...	cobva@ghimedicare.com
	To...	All E-Mail addresses associated with case
	Cc...	
Subject:		Alert ## Has Been Posted

Account Number: #####  
Case Control Number: #####  
Alert Type: See values below

A/An [Alert Type] alert has been posted on the Workers' Compensation Medicare Set-Aside Portal. This alert contains information relating to recent activity on case ##### for account number #####.

Note: Alert Types are: Below Threshold, Development, Deny, Zero Set Aside, Under Threshold, Approval and Closeout.

Please log into web site [www.wcmsap.com](http://www.wcmsap.com) to review the alert details.

\*\*\* PLEASE DO NOT REPLY TO THIS E-MAIL \*\*\*

Confidentiality Note:

This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential or otherwise protected from disclosure. If you have received this transmission, but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the COBC Electronic Data Interchange (EDI) Department at 646-458-6777 and delete and destroy the original message and all copies.

## Slide notes

A sample of an e-mail alert is shown here.

The e-mail alert will contain the case number and the type of error found and will invite the submitter to view the alert or letter on the WCMSAP.

Most alerts are informational; however, some require action on the case.

You must read the alert and respond if necessary.

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**CMS** Workers' Compensation Medicare Set-Aside Web Portal **COB**

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## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

[Create a New Case](#)

[Case Lookup](#)

[View Alerts](#)

**QUICK HELP**

[Help About This Page](#)

**Account Settings**

[Update Personal Information](#)

[Update Account Information](#)

[Designee Maintenance](#)

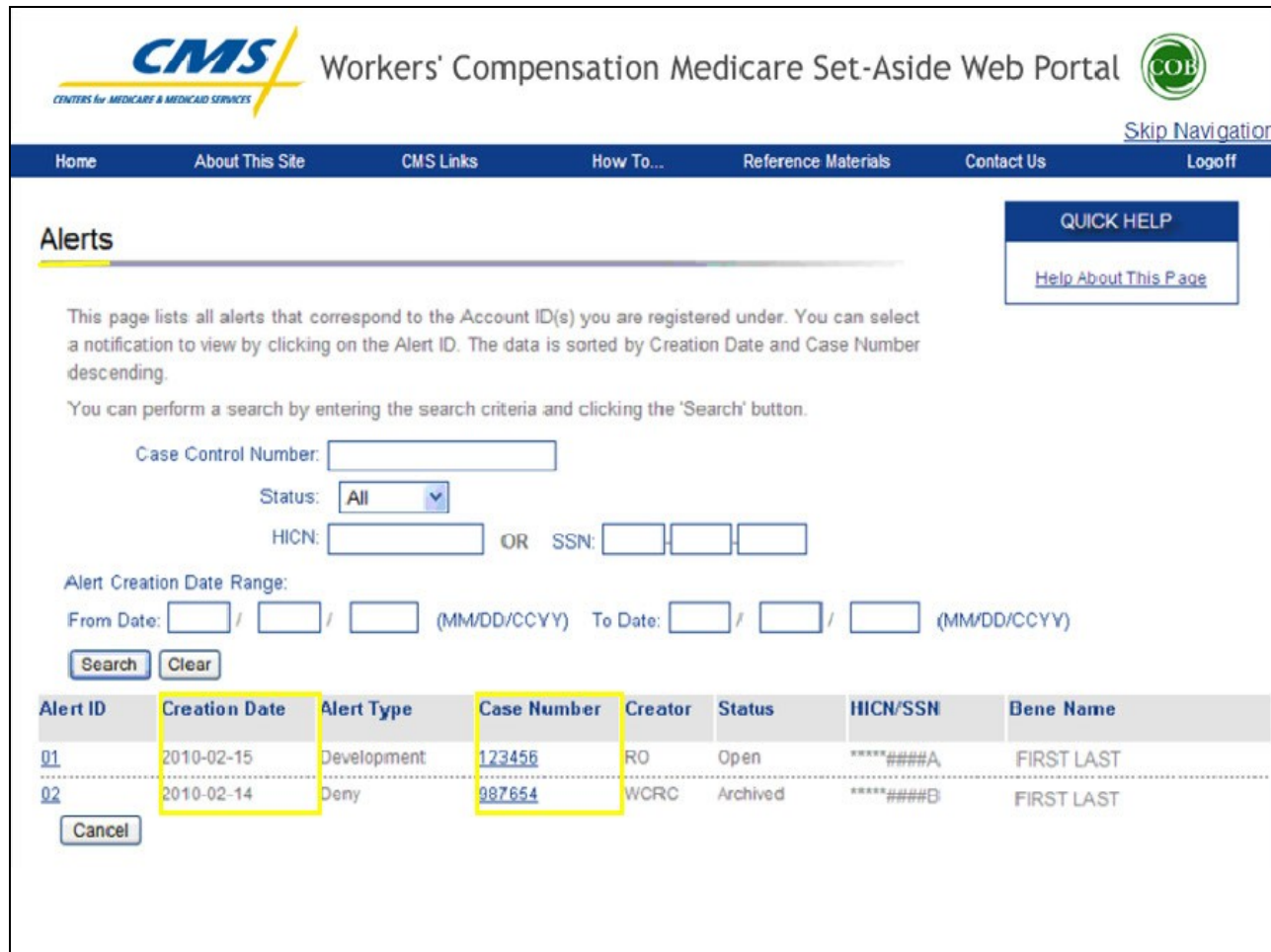
[View Account Activity](#)


[Change Password](#)

## Slide notes

To view Alerts click the View Alerts link from the WCMSAP Home page.

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## Alerts

QUICK HELP  
[Help About This Page](#)

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status:  ▼

HICN:  OR SSN:

Alert Creation Date Range:  
From Date:  /  /  (MM/DD/CCYY) To Date:  /  /  (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****B	FIRST LAST

## Slide notes

The Alerts page will display.

By default, this page lists all alerts for the previous 60 days associated with the Account ID you are registered under.

The data is sorted by Creation Date in descending order, however, you may sort the listing by case number and/or creation date.



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**Alerts**

Please Note: Dates must be entered in a two position month, two position day and four position year format.

QUICK HELP  
[Help About This Page](#)

This page lists all alerts that have been generated. You can click on a notification to view by clicking on the alert ID. The alerts are listed in descending order.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status:

HICN:  OR SSN:

Alert Creation Date Range:

From Date:  /  /  (MM/DD/CCYY) To Date:  /  /  (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****B	FIRST LAST

## Slide notes

If the specific Alert is not in the current display list, you have the ability to search for the alert using various search criteria.

You may search for alerts using any or all of the following fields to narrow down your search results:

Case Control Number - the number assigned to the WCMSAP case by the system;

Case Status - the status associated to the alert. Options are Read, Not Read and, Archived;

HICN – the Health Insurance Claim Number of the Beneficiary/Claimant associated to the alert;

SSN - the Social Security Number of the Beneficiary/Claimant associated to the alert; and

Creation From and To Date Range - the beginning and ending case creation dates.

Please Note: Dates must be entered in a two position month, two position day and four position year format.

Once you have populated all relevant search criteria, click the Search button.



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**Alerts**

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date descending.

You can perform a search by entering the search criteria and clicking the Search button.

Case Control Number:

Status:

HICN:  OR SSN:

Alert Creation Date Range:  
From Date:  /  /  (MM/DD/CCYY) To Date:  /  /  (MM/DD/CCYY)

**Values for Alert Type:**

- Below Threshold
- Development
- Deny
- Zero Set Aside
- Approval
- Closeout
- Deceased Beneficiary
- Co-Mingling

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****B	FIRST LAST

## Slide notes

The Alerts page will redisplay. The only alerts listed will be those that matched the search criteria that were also associated to your Account ID.

The Alert listing in the lower half of the Alerts page includes the following information related to the Alert: Alert ID - the ID number associated to the alert; Creation Date - the date the alert was created;

Alert Type - the type of alert. Most alerts are a letter, and the Alert Detail page will contain the letter in PDF format. Values for Alert Type include: Below Threshold indicates a case where: the claimant is currently a Medicare beneficiary and the total settlement amount is \$25,000 or less; or the claimant does not have a reasonable expectation of Medicare enrollment within 30 months of the settlement date and the total settlement amount is \$250,000 or less. Development - indicates that there is a need to gather additional information or documentation. Deny - indicates that the proposed WCMSA amount has been denied. Zero Set Aside - indicates that the settlement has been approved with a Medicare Set-Aside Amount of zero dollars. Approval - indicates the settlement has been approved. This alert includes recommendation attachments. Closeout - indicates the WCMSA case has been closed.

Deceased Beneficiary - indicates that the system found a date of death for the beneficiary. This alert does not produce a letter.



Co-Mingling - indicates that documents must be replaced on the case. Only files that have been flagged as replaceable can be replaced. This alert does not produce a letter.

(Note: When co-mingling has occurred the system must check to confirm that a replacement file was provided by the user. The case will be automatically closed if the replacement documentation is not received within 10 business days). Case Number - the Case Control Number associated with the alert;

Creator - the entity that entered the alert. Options are Workers' Compensation Recovery Contractor (WCRC), and Regional Office (RO). Status - the status of the alert. Options are Open or Archived.

HICN/SSN - the HICN or SSN of the beneficiary or claimant associated with the case. The first 5 digits of the HICN or SSN are masked by asterisks. Bene Name - the name of the beneficiary or claimant associated with the case.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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**Alerts**

QUICK HELP  
[Help About This Page](#)

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: **All**

HICN:  OR SSN:

Alert Creation Date Range:  
From Date:  /  /  (MM/DD/CCYY) To Date:  /  /  (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****B	FIRST LAST

## Slide notes

To view a specific alert, click on an Alert ID.

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Where possible, please submit any requested documents via the website instead of faxing or mailing.

[Archive This Alert](#) [Close This Window](#)

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DEPARTMENT OF HEALTH & HUMAN SERVICES  
Centers for Medicare & Medicaid Services

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First Last

RE: Workers' Compensation Medicare Set-aside Arrangement

Claimant: First Last

HICN:

SSN: #####

Date of Injury: Unknown

CMS Case Control Number: #####

Dear First Last

This letter is in response to your initial proposal submitted on Unknown for a Workers' Compensation Medicare Set-aside Arrangement (WCMSA) on behalf of the above named individual.

You proposed that a WCMSA in the amount of \$25,000.00 be available for the purpose of paying future medical services related to the work injury or disease that would otherwise be reimbursable by Medicare. We have evaluated your proposal to protect Medicare's interests with a WCMSA for future medical expenses related to John Doe adequately considers Medicare's interests. The WCMSA funds must be placed in an interest bearing account. Funds must be available for payment of services that would otherwise be covered by Medicare per the following payment schedule.

**WORKERS COMPENSATION MEDICARE SET-ASIDE REVIEW**

Case Control #: ##### HICN: SSN: #####

Claimant's Name: First Last

Date of Injury: #####



## Slide notes

When the Alert ID is clicked, the system will display the Alert Detail page for the selected alert.

The Alert Detail page will include all details for the selected alert.

Most alerts are accompanied by letters. In most instances, the Alert Detail page will display the contents of the letter in PDF format.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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### Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: **All**

HICN:  OR SSN: --

Alert Creation Date Range:  
From Date:  /  /  (MM/DD/CCYY) To Date:  /  /  (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
<a href="#">01</a>	2010-02-15	Development	<a href="#">122756</a>	RO	Open	*****A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****B	FIRST LAST

QUICK HELP

[Help About This Page](#)

## Slide notes

You may also have the option to view all alerts associated to a specific case by clicking on a specific Case Number.

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The screenshot displays the 'Workers' Compensation Medicare Set-Aside Web Portal'. The header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main content area is titled 'Alert Listing' and shows a case number field with a masked value. Below this, a message states: 'This page lists all the alerts for the selected case. The data is sorted by Alert Creation Date (descending)'. A table lists two alerts:

Alert ID	Alert Creation Date	Alert Type	Creator	Status	HICN/SSN	Bene Name
<a href="#">127</a>	01/31/2011	Under Threshold	WCSEA	READ	#####A	FIRST LAST
<a href="#">125</a>	01/31/2011	Denied	WCSEA	READ	#####B	FIRST LAST

Below the table is a 'Previous' button. A blue arrow points from the 'Previous' button to the 'Alert ID' column header.

## Slide notes

When the case number link is selected, the system will display the Alert Listing page where all alerts associated to the selected case will be displayed.


You can then click an Alert ID link to view a specific alert.



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Where possible, please submit any requested documents via the website instead of faxing or mailing.

[Archive This Alert](#) [Close This Window](#)

 DEPARTMENT OF HEALTH & HUMAN SERVICES  
Centers for Medicare & Medicaid Services

First Last

RE: Workers' Compensation Medicare Set-aside Arrangement

Claimant: First Last

HICN: #####

SSN: Unknown

Date of Injury: #####

CMS Case Control Number: #####

Dear First Last

This letter is in response to your initial proposal submitted on Unknown for a Workers' Compensation Medicare Set-aside Arrangement (WCMSA) on behalf of the above named individual.

You proposed that a WCMSA in the amount of \$25,000.00 be available for the purpose of paying future medical services related to the work injury or disease that would otherwise be reimbursable by Medicare. We have evaluated your proposal to protect Medicare's interests with a WCMSA for future medical expenses related to John Doe adequately considers Medicare's interests. The WCMSA funds must be placed in an interest bearing account. Funds must be available for payment of services that would otherwise be covered by Medicare per the following payment schedule.

**WORKERS COMPENSATION MEDICARE SET-ASIDE REVIEW**

Case Control #: ##### HICN: SSN: #####

Claimant's Name: First Last

Date of Injury: #####

## Slide notes

Again, once an Alert ID is clicked, the system will display the Alert Detail page for the selected Alert.

Once a specific alert has been accessed, you should read the alert and determine what actions need to be taken. If the alert requires changes to the account, access the case using the Case Lookup link on the WCMSAP Home page.

Please see the Case Lookup CBT for more information on how to access a WCMSA case.

After viewing the alert, click the Archive This Alert button to change the alert status to Archived. Click the Close this Window button to close the alert and return to the previous page.

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You have completed the WCMSAP Alerts course.  
The information in this course can be referenced  
by using the document at the link below.

[https://www.cob.cms.hhs.gov/WCMSA/help/user  
Manual/WCMSAUserManual.pdf](https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf)

## Slide notes